

**Access to Microfinance & Improved Implementation of Policy Reform
(AMIR Program)**

Funded By U.S. Agency for International Development

**Investment Promotion Training for
Jordan's Investment Promotion Corporation (IPC):
Modules 1-4**

Final Report

**Deliverable for Trade Policy Component
Contract No. 278-C-00-98-00029-00**

May 1999

This report was prepared by The Services Group, Inc., sub-contractor, for Chemonics International Inc., prime contractor to the U.S. Agency for International Development for the AMIR Program in Jordan.

Investment Promotion Training for Jordan's Investment Promotion Corporation (IPC): Modules 1-4

Introduction

The IPC baseline analysis identified several areas where Jordan's fledgling investment promotion agency would stand to benefit from focused training. The Services Group Inc. (TSG), sub-contractors to Chemonics under the AMIR project, recently began implementation of a training program, custom designed to meet the needs of the Investment Promotion Corporation (IPC) and build high priority skills among key staff and management.

Based on consultations with senior IPC management, TSG assembled four training modules to be delivered during early 1999:

MODULE 1: (Managing the Investor I) PROVIDING GREAT CUSTOMER SERVICE

MODULE 2: (Managing the Investor II) WINNING CUSTOMERS AND KEEPING THEM

MODULE 3: THE SELLING PROCESS

MODULE 4: GLOBAL INVESTMENT TRENDS & TARGETING INVESTORS

The following report summarizes the results of these training modules, which took place between February 18 and April 19, 1999.

Timing and Facilitation of Modules

The training began with Module 4, as it was felt that IPC staff would benefit by starting with a broad overview of investment trends and fundamental aspects of investment promotion. This turned out to be a good decision. Staff participants revealed that they required, and indeed, were enthusiastic about receiving this type of training, prior to getting into some of the more detailed aspects contained in Modules 1 through 3. TSG Senior Consultant Vincent Ruddy delivered this module, which consisted of 5 sessions of approximately 1 1/2 to 2 hours each.

Immediately upon completion of Module 4, Mr. Ruddy proceeded to deliver Module 3: The Selling Process. This module also consisted of five sessions of 1 1/2 to 2 hours each. In all, modules 4 and 3 required almost 3 weeks to complete, running between Feb. 18 and March 3, 1999.

Modules 1 and 2 were delivered one month later, between April 3 and April 19, 1999. Module 1, Managing the Investor 1, Customer Service, consisted of 6 sessions and was completed by 10 April. Module 2, Managing the Investor 2, Winning Customers and Keeping Them, also consisted of 6 sessions and was completed on 19 April. Details for each of the 4 modules are given at **Annex A**.

For Modules 1 and 2, Mr. Ruddy was joined by Mr. John Hagestadt, Senior Investment Advisor, The Services Group Inc. Both consultants took turns leading the various class sessions.

Training Sessions with IPC Management

In addition, the trainers jointly conducted 4 formal sessions with the top management of IPC to discuss the application of the training given to top management itself. This was deemed a necessary approach following the results of modules 4 and 3. While meetings were held with managers during these prior modules, it became obvious that having group sessions with as many managers as possible would be far more beneficial.

The Director-General and other members of the top management team took the opportunity to raise important current issues facing the IPC at these sessions. Following a visit by the new Prime Minister to the IPC in March, the Director-General will present in May a plan to the Council of Ministers in the presence of His Majesty. The Prime Minister is said to be determined that the approval process for new investment should be speeded up and wants to give the IPC more authority to achieve this objective. The new Government's statement of objectives was published during our visit and gave priority to increasing investment. The Director-General asked for our input on a proposal to second staff from other ministries with regulatory responsibilities to the IPC to create a "One Stop Shop", and the 1999 Operating Plan.

The training team held one-on-one sessions with members of the top management and individual members of the class who requested them. In the case of the Director-General, the Director of Promotion Division, and the Director of the Research and Planning Division the issues demanded three or more separate discussions.

People Consulted & Briefed

The trainers were fortunate in working with responsive staff members of the IPC team who were eager to learn, and with a top management team who were open about the strengths and weaknesses of the IPC. They liaised closely with Mr Sam Morris, the IPC Resident Advisor and met twice with Mr Stephen Wade, the AMIR Program Director, and at the half way stage with Mr Jamal AL-Jaberi, Senior Private Sector Officer, USAID, in Amman.

Notwithstanding the valuable insight and suggestions of all consulted people, the observations and recommendations contained in this report reflect the opinions of the consultants involved, and not necessarily the IPC, AMIR, or USAID.

Module 4, Global Investment Trends & Targeting Investors

As the first training course, module 4 served as a basic introduction-- to the 4 modules in general, as well as to the basic concepts and approaches related to the promotion of investment. While managers stated that participation in this and subsequent modules would be mandatory for all staff, in practice, several staff abstained due to excessive work loads, inability to stay late after class, or the need to cover phones and incoming investors while companions attended class. Incomplete attendance continued, even after two sessions were offered (one at 10:00 a.m., and a second at 2:30 p.m.; in general, the morning session was attended by staff from investor servicing, research and planning, and computer departments; the afternoon session by promotion staff).

High interest in organizational structure issue

One particular topic appeared to stimulate much discussion and heightened interest

among staff and managers: organizational structures of investment promotion agencies (IPA's). Apparently, the IPC had been debating about the adequacy of its current organizational structure, which is based on a functional approach (common among regulatory-focused IPA's). The participants were taught that most successful promotion-oriented IPAs have adopted structures with a more sectoral focus. This raised interest in the possible need for the IPC to evolve its organizational structure and have more sectoral focus, particularly in the promotion department (currently, there are sector-specific units, but these are limited to investor servicing activities, not promotion).

As of April 19, it appeared that IPC managers were in the process of taking steps to build sector-specific capacity within the promotion department, including bringing in new staff with designated sectors of focus. However, it is not clear whether there is a high level commitment to a formal change to the organizational structure in this regard.

Participants also agreed that the IPC shared several of the defects found in unsuccessful investment promotion agencies reviewed as part of Module 4. Most of these were due to the IPC being a public agency lacking high level clout, subject to restrictive hiring and firing rules, politically appointed management/staff, and an inward focus (much time is spent responding to requests by other ministries). While it does not appear that political forces will align in the short term to change this, the Government of Jordan has at least created some conditions that will help make the IPC better than most other typical public sector agencies, including somewhat higher staff salaries and effective leadership.

In addition to the power point slides included in the Annex, two video segments were shown, and two different case studies were presented. All appeared effective in teaching key concepts and skills, with the exception of the Ford in Spain case study (see comments below under Evaluations).

Module 4: Absorption by Attendees

The participants who did attend Module 4 (see Annex B) were generally engaged, attentive, and demonstrated high absorption of class material. Participants found the experiences of other developing country investment promotion agencies to be particularly useful. Many referred to their own personal experiences in making comments or questions about key lessons for each session.

However, there was also a sense of frustration, in that staff perceived that while they were learning valuable information, they were largely unable to put it into practice, since they had to follow the orders of managers who were not participating in the training sessions and therefore not developing new plans or procedures accordingly. This is one reason special sessions for managers were set up for Modules 1 and 2.

Language presented a problem for some participants, particularly those from departments other than Promotions. This was a limiting factor for the Ford in Spain case study, and for more sophisticated discussions of some issues relevant to this module.

Module 4: Evaluations

Roughly half the participants completed and turned in evaluations for the course. This was due to the fact that they were not handed out immediately at the end of the

module, but rather, a week later at the end of Module 3, when participants were asked to evaluate both modules. By this time, many simply forgot to turn back in the forms.

Those evaluations that were received (see Annex C) gave a favorable impression of the course, along with some useful comments and suggestions. On a scale of 1-5, five being Great! And 1 being "boring", most scores for session enjoyment were in the 4-5 range, with a couple of 3's for specific sessions. Utility scores, quantity learned, and overall evaluation scores were similar (most ranked 4 or 5).

Many participants commented that the Ford in Spain case study was not very appropriate, since it dealt with negotiation between a government and a large multinational, and the IPC does not get involved with such negotiations. The case was also very long, entailed complex English, and required substantial times for preparation among staff.

Module 3, The Selling Process

While this module had the most relevance to staff and managers from the Promotions Dept., participants included those from Investor Servicing, Research and Planning, and Computer Departments. This is a good idea, as it will give people from all departments a better appreciation for the work and techniques that should be central to the IPC: investment generation. As in module 4, two sessions were offered: 10 a.m. and 2:30 p.m. An effort was made to shorten the class sessions from 2 hours to 1 1/2 hours, due to complaints by staff that they were being overworked, and needed more time to prepare homework assignments.

This module introduced and provided skills training for a more proactive mode of investment promotion known as Investment Generation. Module participants recognized that, until now, the IPC has not been in this mode, but rather in a more passive and reactive mode whereby staff simply respond to inquiries made by investors. No overseas offices for IPC currently exist, and use is not being made of direct, one-on-one visits to potential investors. Instead, IPC has been doing what many other agencies typically do at early stages: participating in industry exhibitions (stands and booths) and doing occasional presentations to select groups (e.g., Israeli businessmen).

As such, the module came at an important moment. The IPC is now in the process of developing and implementing a more aggressive promotion approach which will include direct contact methods. Participants found the step-by-step process of identifying, contacting, classifying, and setting up outward and inward missions useful. They also seemed to recognize the value of avoiding costly mistakes such as spending large amounts of money on advertisements in general media and relying on industry exhibitions and trade fairs to generate investment.

The need for delegation

Two key issues surfaced in the course of teaching participants skills related to effective communications. First, the lack of delegation in terms of responding to written correspondence. IPC management have not felt it appropriate to let staff respond directly to investor inquiries, via fax or e-mail. Hence, letter writing skills building sessions & homework were useful, but limited in terms of being exploited by this style of management (review, signature, and final sending of responses often results in delays). Second, IPC staff and managers currently do not make presentations. This is reserved for the Director General. While there may be reasons

for this, the consultant emphasized that once the IPC moves into a more proactive, aggressive mode of investment generation, it will be necessary to have several other IPC staff prepared and able to make presentations, simply because of the sheer volume of work and the need to conduct presentations in parallel in different parts of the world.

Module 3: Absorption by Attendees

Participants exhibited high to medium high levels of absorption of course concepts and skills. However, presentation skills are still relatively weak among most staff, in spite of the good English capabilities and generally high levels of confidence they possess. The problem here would appear to be lack of practice-- as stated above, IPC staff and management are not presently allowed to make presentations, nor have they been encouraged to prepare themselves for this eventuality. The planned training in presentation skills (to be implemented under AMIR by another American consultant resident in Egypt) ought to help in this regard. So too should recent feedback given to IPC management in terms of the length and suitability of the presently used generic presentation materials (power point slide show).

Module 3: Evaluations

The evaluation results were similar to those of module 4. Most gave scores of 4 and 5 (out of a range of 1-5, 5 being highest) to enjoyment, utility, amount learned, and overall score for each of the sessions. There were a few 3's in specific areas, but no real consistency here-- this seemed to depend on the individual's current job and personal preferences. Completed evaluations are included in Annex C.

There were however some common comments, such as the need for management to be exposed to the module's main ideas; and the desire to be able to dedicate more time to the course outside of the normal work environment. There appears to be a prevailing opinion among IPC staff that training is best done in a way that allows participants to leave the premises and be free of normal working duties while they participate. People appeared especially sensitive to staying after normal working hours (the Promotion department staff had to do this more than others, since they attended primarily the afternoon session).

High interest in and relevance of outward missions

Promotion dept. staff appeared to especially appreciate the session on outward missions. Plans were made to deliver the outward mission presentation to IPC management (this was carried out during the first management session, see below). All Promotion staff rated between 4 and 5 the video segment dealing with image building, while staff from other departments appeared to appreciate it somewhat less, with a couple of lower scores (2 and 3). Advertising issues evidently are less interesting to staff from Research and Planning and Administration Depts.

Module 1, Managing the Investor - Customer Service

The success of this module required participation by representatives from all the divisions in IPC. Rather than separate the class into 2 groups as done in the previous two modules, the trainers decided it would be better to mix staff from the various departments together into 1 larger group. One of the main reasons for this was the

evident lack of communication and cooperation between IPC departments. As explained below, this strategy proved to be useful.

Top level commitment to maximizing training participation

Another key factor was ensuring greater attendance, since the material covered under customer service is widely, if not comprehensively applicable to all of the organization's staff. The Director-General issued an instruction that all staff were to attend. In practice the class size stayed around 15 which was a manageable given the inter-active nature of the workshop.

The basic approach to customer service training

IPC staff were taught to think of themselves as a customer service organisation seeking to increase its core business rather than as a government department. An emphasis was placed on good private sector practices developed in highly customer focused sectors such as airline and hotel businesses. The concept of internal customers was new to nearly all members of the workshop.

Techniques and skills taught in the module included telephone etiquette, dealing with difficult customers, gaining co-operation from other colleagues within the organisation, dealing with conflict and the need for a team approach to customer care. The subject matter was conducive to the use of role playing exercises in which staff were taught techniques for handling angry customers, for adopting a positive approach and taking responsibility in responding to telephone calls when the lead official was not available, dealing with conflict and making a distinction between customer wants versus needs.

Discussion on the team nature of successful investment promotion confirmed an important weakness in the IPC. Loyalty in the organisation tends to be to the Division rather than the IPC as a whole. There is also insufficient delegation downwards (see last Section below on Meetings With Top Management). Too much time is spent referring internal issues and correspondence upward for resolution or approval by a Director. The staff themselves felt more internal issues should be settled at operational level in face to face meetings rather than by memo. Attendees were in favor of adopting methods (training courses off-site, social events, celebrations of success etc.) to build closer relationships between divisions.

Module 1: Absorption by attendees.

The attendance list is attached at Annex B. Three or four individuals lasted only one or two sessions. Their English comprehension may have been poor. One more senior official attended only one session having taken umbrage that he was not properly consulted about the timing of the sessions. It was notable that in the early sessions most of the input came from Promotion Department staff but as the modules progressed, the remainder of the class became much less reticent. Those who maintained a good attendance record and remained very quiet appeared to have good comprehension but lacked confidence in speaking English. We were encouraged by the IPC's staff own initiative in embarking on British Council lessons in English beginning in May. Eng. Mari Ibdah had already taken the point before we made it that it would be better if these classes could take place on-site and save the staff time travelling into central Amman.

The lessons about telephone etiquette have not yet lead to any noticeable improvement to judge by the random sample of telephone calls made by the trainers

during the course of their stay in Amman. This was not because the lessons were poorly understood but because poor habits are not easily changed. It was interesting that only two members of staff asked to respond to a questionnaire realised that none of the four typical examples given of an employee responding to a telephone enquiry was correct. We have drawn the management's attention to the need to correct the habitual "yes" (in Arabic) IPC response to the telephone with no name or department being given by the person picking up the telephone. This issue should be re-visited in subsequent modules: there is no reason why IPC staff should not be conveying a professional tone in their communications with customers. But they are in need of nagging to achieve this cost-free improvement.

Staff responded self-critically to in-class evaluations of questions directed at their telephone, listening and greeting skills. A common post-course resolution was to improve telephone etiquette and to refrain from interrupting clients during the earlier stages of the first encounter.

Module 1: Evaluations

Two staff in the Promotion Division (including the USAID funded US member of staff), whose English is confident and who are accustomed to dealing with clients, found the module somewhat simplistic and obvious. Other staff gave the module a 3 (recommended) or 4 (highly recommended) rating. One felt that the headmasters of the IPC should be required to attend it. As with Module 2, there was no common thread in the replies to the question which was the most valuable and least valuable of the 6 sessions. The written handout materials were regarded as acceptable. Evaluation forms returned contained in **Annex C**.

The classes themselves were conducted in the early afternoon, starting at 2:30 p.m. There was no consensus on the ideal time, although a majority appeared to prefer the morning. A few from the Promotions Division preferred the afternoon, however, since they often have to meet investors in the late morning. Most other staff preferred the morning on the grounds that they were fresher. The main concern of the senior management and the trainers was that the class was attended by all the divisions of the IPC together. This proved the right decision. Many of the more thoughtful staff said that one of the most valuable aspects of the modules was that they were discussing live issues for the first time with colleagues from other divisions.

There was a strongly expressed view that the staff of other agencies dealing with investors would benefit from customer service training. TSG colleagues carrying out Investor Roadmap and other activities should soon be able to get a feel if the time is ripe for an initiative and how the matter is best raised with them. This idea is therefore included among the recommendations listed toward the end of this report.

Module 2, Managing the Investor - Winning Customers and Retaining them.

This module was more directly focused at the Promotion, Investor Services, and Planning Divisions. There were nevertheless conscientious officials outside these divisions who attended the module, including on two occasions the telephone operator. IPC-wide attendance was useful particularly in the last 2 sessions when the opportunity was taken to assemble the views expressed during the 2 modules and the meetings with managers to put together a Customer Service Action Plan.

The trainers adopted essentially the same approach as in Module 1. Sessions 1 and 2

on Effective Selling explained the selling process in typical private sector contexts and applied the lessons relevant to the investment promotion environment. Key topics taught were communication skills, building rapport, developing good communication skills, understanding customer expectations, handling objections, and completing the sale.

Sessions 1 and 2 on Effective Selling were used to build confidence in IPC staff's abilities to persuade investors to locate in Jordan. Inquirers who take the initiative in approaching the IPC are for the most part not engaged in casual window shopping. The initial approach to new investors must be take their inquiries at face value and respond these approaches in professional manner with least delay. Some tuition was given in validating enquiries but this is a subject which staff in the investor services division in particular would probably find it useful for the trainers to re-visit in a subsequent module.

The main focus in these two session was on selling to the foreign investor which represent the greatest challenge. The staff were receptive to the concept of selling the country as a gateway to the wider Middle East market,. Some felt they needed to increase their knowledge of competitor markets (a sound reaction). The benefits of adopting a structured approach in responding to inquires and how to build up a relationship of trust with investors who approach IPC with different (not always positive) preconceptions was explained.

Investor aftercare sessions

The following two and a half sessions were used to explain the vital importance of Investor Aftercare in the investment promotion business. Two distinct types of aftercare process were analysed: aftercare in assisting the investor who has just made a commitment to invest and needs help through the approval process with other ministries; and aftercare in making contact on a regular basis with established companies who are natural first targets for the IPC efforts to increase the rate of investment growth in Jordan. Subjects covered included the Account Executive aftercare model, good and bad institutional models of aftercare, 10 major Do's and Don'ts in Investor Aftercare, and Designing a Customer Survey.

The session covering the Account Executive aftercare model turned out to be one of the most significantly beneficial of this and the other 3 modules. This is because it came just as IPC management and staff had begun to design and plan a so-called "one-stop-shop" to help investors deal with start-up procedures, permits, approvals, licenses, and the like. More on this issue is presented below under the Meetings with Top Management section.

The discussion on Customer Surveys was aided by the appearance of a draft survey, which was in an advanced state of completion, prepared by the Planning, Development and Information Services Division. Representatives from other Divisions gave it a positive reception. The draft, which is at **Annex D**, should be finalised shortly. TSG would expect to discuss the results of the survey with classes in future workshops.

Customer Service Action Plan

The last one and a half sessions were devoted to discussions on a Customer Service Action Plan (CSAP), **Annex E**, and on a Mission Statement. The members of the workshop were gratified that the senior management had committed themselves to

implementing the Plan and nominated lead officials. As they had done in the discussion on teambuilding in Module 1, they expressed enthusiasm for team building initiatives held off site (e.g. training sessions held as part of an organised visit to a Qualified Industrial Zone) and merit awards for exceptional effort (e.g. the idea of an Employee of the Month program) provided the selection criteria are transparent. A positive reaction was also forthcoming to the idea that IPC should have a Mission statement prominently displayed in the entrance and in Arabic and English and published in the media.

Module 2: Absorption by attendees

The absorption level was high during all the sessions (see attendance list, Annex B). The view of the majority that the class should be switched to the morning was probably a factor. Question and observations made by the class were always relevant and assisted the trainers in expanding on points which needed fuller treatment. Staff were also more conscious that subjects being discussed (e.g. the Account Executive Model and Customer Service Action Plan) were concurrently being given attention by senior management.

Module 2: Evaluations

The returned Course Evaluation forms can be found at **Annex C**. One or two attendees pointed out that they were not directly engaged in the selling process. By a small margin, the sessions on aftercare were considered the most valuable. As with all evaluations for other modules, attendees were not obliged to sign their evaluation forms.

Meetings with Top Management Team

The 4 meetings took place with one exception after hours to minimize time constraints. The Director-General took the initiative at the first meeting to make a formal presentation on Investing in Jordan using power point slides prepared for a conference with Israeli investors. His own communication skills are indeed impressive: he talks in fluent English, knows his text virtually by heart and constantly maintains eye contact with his audience. The presentation itself was too long and detailed for normal purposes. We were told that its format was largely determined by what the organisers had specified.

Need for more delegation

The IPC needs to move beyond relying almost exclusively on the Director-General to make presentations. This situation should soon be remedied with the training to be given in presentation skills by a specialist US trainer with Middle East experience.

The trainers were quite critical of the general rule that written correspondence addressed outside the IPC should only be signed by a Director. (The actual situation had been even worse until recently when all correspondence on substantive matters had required the signature of the Director-General). In practice this restriction will begin to be circumvented with the advent of email accounts for all staff. Nevertheless, the trainers were struck by the evident resistance to real devolution from the top management. The continued concentration of responsibility at Director and department head levels will hamper the ability of the IPC to respond promptly as the volume of business increases and frustrate the more able, committed staff at junior levels.

The trainers accept that communications on policy matters with GOJ ministries should go under the Director General's signature especially at the present time when the future role and scope of the IPC is under high level scrutiny.

Other organizational issues

The management sessions were used to give immediate feedback of the views of the staff on the functioning of the organisation. Senior management did not dispute the picture that the trainers had formed of an over-compartmentalized organisation with too little interchange of views between operating divisions. There was a little scepticism expressed about the value of non-financial rewards for exceptional effort though this was a minority view. Bonuses are already paid to staff on a twice yearly basis.

Assistance in developing a solid 1999 operating plan for the IPC

During the second management session, the trainers were invited at short notice to comment on the IPC's 1999 Operating Plan, which had recently been drafted. The trainers were able to make this input thanks to the prompt assistance over a weekend of AMIR colleagues in making an English translation. The draft Plan is at **Annex F**. The revised version should contain many more quantified targets for each Directorate. The current drafts expectation that foreign investments can be raised from 10-12 to 70 a year is clearly unrealistic. The Plan should ideally contain bottom-line targets for the number of new investments, value of new investments and jobs created. IPC pointed out that the current methods of data collection make it particularly difficult to give figures for jobs. Given the relatively short life span of the IPC, it is likely to take another year or two before its annual operating plans achieve the desired standard without external assistance.

The One-Stop Shop issue

It was fortunate that the course took place at the time when an elaborate proposal to set up an expanded One-Stop Shop in the IPC building was almost ready for presentation to the Prime Minister. The original proposal was based on the assumption that only by transferring officials from the ministries with the main legal responsibilities for issuing the licenses and permits to the IPC could the necessary improvements in approval times be obtained. This subject was extensively debated at the second management meeting, but could not be resolved. A subsequent smaller meeting to deal with this particular issue took place with the Directors for Promotion and Research and Development. At this meeting, comments made by the Director of the Promotions Dept. implied that, in spite of the trainers' recommendations to the contrary, the IPC intended to go forward with "bureaucrats in the basement" approach, even though this already failed in the past (in Jordan, as well as in numerous other countries, as pointed out).

Finally, on the second to last day of the training program, Eng. Mari Ibdah met with the trainers to communicate the results of IPC management's final decisions on how they would proceed forward with the so-called "one-stop shop" proposal. Apparently, the managers finally made a decision to reverse course, and adopt some if not all of the trainers' recommendations. The Director General requested that a memorandum be produced overnight, to help him describe and justify the newly proposed model. This memorandum is attached at **Annex G**.

The trainers were very pleased that the revised proposal submitted to the Director General took account of virtually all their concerns about the originally proposed one-stop shop model. If the IPC can resist future temptation to build an empire in the basement with staff seconded from other ministries, but concentrate instead on getting the GOJ to establish transparent targets for improving the turnaround of investor applications in other ministries, the future performance of the IPC in generating new investment will be much enhanced.

The importance of adopting the Account Executive Model

Rather than use the "bureaucrats in the basement" model, top management were receptive to the proposal that designated IPC account executives should be appointed to take over cases from the Promotions Division once a company had committed to investing in Jordan. The current situation is that in important cases this task is often undertaken by the Promotion Division case officer, although this is a task which is normally undertaken by the Investor Services Division. As new business increases, this reliance on the Promotion Division will no longer be practical. While the trainers were able to identify 6 individuals who would in their opinion be capable of taking on this task, it is of course for the management not the consultants to decide on the makeup of any team.

To ensure that this works, steps need to be taken soon to build up an effective account executive capability. This capability must be distinct from the regulatory, or ?policeman? capability and role, which the Investor Services Division is already doing as required by the legislation (they must verify that companies benefiting from tax and duty concessions are fulfilling the conditions on which the benefits were granted). As noted below under recommendations, the trainers believe that in order to implement the account executive model and avoid set-backs in the critical area of investor aftercare, associated IPC staff and management will require a specialized training program, to be started in July of 1999 if this is possible.

Mission Statement

Both management and staff are now committed to developing a Mission Statement. It should state the purpose of the organisation, its commitment to providing top quality service to its clients and developing the potential of the staff of the IPC. Whilst the Services Group is ready to assist in the drafting of the Statement, the most effective statement emerge from intensive internal consultations within the organisation itself.

Customer Service Action Plan

The final meeting with the Top Management Team and the last session of Module 2 involved participants themselves helping to define a Customer Service Action Plan. The managers took the first turn at defining goals to be achieved prior to the end of 1999. Sub-goals and tasks were also identified. The managers made projections as to the time required to accomplish these, thus establishing deadlines. Finally, the Director General helped in designating responsible managers who will take charge of making sure that specific elements are implemented.

The resultant Customer Service Action Plan is presented in **Annex E**. This has been distributed to Senior Management and the staff who attended the final session. Undue delay or partial implementation of this plan would be damaging to staff morale. The Services Group trainers look forward to reviewing progress in implementation during the course of the next few months. They appreciated the immediate clear

endorsement given by the Director General and his immediate designation of lead officers to take forward the necessary action on key components.

Finally, certificates have been prepared to give regular attendees of the course. Management's delay in issuing the certificates prepared at the conclusion of Modules 3 and 4 was criticised by staff and many of them personally approached the trainers expressing the hope that the certificates would shortly be made available. The Director General has undertaken to hand them over personally to each course member who has qualified.

In future training modules, trainers should coordinate with the IPC's graphic artist staff member, who has the training certificate format saved electronically, and should be able to quickly and efficiently produce subsequent certificates as well as was done for these first 4 modules.

Summary of Recommendations

Based on the results of all four training modules, the consultants offer the following recommendations:

Institute intensive Account Executive training by July. A draft scope of work for this training is attached in **Annex H**.

Modify and re-sequence next 4 training modules. The first that should be delivered (Module 5) is Intensive Training on Implementation of Account Executive Model. This was not contemplated in original baseline assessment. The second (Module 6) would be "How different organizations and companies fit into the country's national investment promotion effort" (originally tagged as Module 5). The new Module 5, Intensive Training on Implementation of Account Executive Model, should be started no later than July if possible (ideally, this would take place at the same time that strategic planning activities are underway at IPC, which had been contemplated for July). The new Module 6, "How different organizations and companies fit into the country's national investment promotion effort", should commence as soon as Module 5 is completed-- i.e., Modules 5 and 6 should be implemented over a 2-3 week period, serially.

The old Module 7 (Devising a Strategy: Role Playing) would be eliminated, replaced as it were by the new module 5. The new Module 7 would be "How to prepare a marketing strategy" (previously tagged as Module 6). Finally, Module 8 would be the same: Resourcing the Investment Promotion Effort. Both Modules 7 and 8 could be implemented in late 1999 or early 2000.

Offer training for IPC staff in computer use. About 50% of staff do not use computers available to them. New computers are scheduled to arrive in May. Training is needed to improve productivity and increase use of software, particularly Word, Power Point, Excel, and data base programs such as Access.

Review progress in implementing the Customer Service Action Plan (see **Annex E**). Those involved in subsequent modules and at top management meetings should pay close attention to following up on this plan.

Undertake periodic "telephone etiquette audits". IPC managers and advisors should check on the effective use of appropriate telephone skills at periodic intervals, since improving this area is low cost, relatively high-impact.

Hold classes for normal staff in the morning (starting between, say, 8:30 and 9:00 a.m.) Subsequent training modules should be held in the morning in most cases. This will help improve the participation and retention rates.

Special sessions for managers should always be provided. Managers need to know what material is being presented to their staff, so that they can make better use of it. Management sessions also provide a structured mechanism whereby IPC leadership can benefit from the expertise of the consultants brought in to train. When possible management sessions should be held after hours.

When possible, include staff from all Departments together in training sessions. This will provide a way for staff to intermingle and help break down barriers between departments and improve cooperation within the organization.

Arrange some training sessions off-site. Ways should be sought to hold some of the future training sessions at sites that can serve not only to upgrade the knowledge of staff concerning important issues (such as site visits to QIZs, to Aqaba's future Freeport site, etc.), but as well to give them an opportunity to be together out of the office environment and experience team building opportunities.

Course Materials

Power Point slides distributed to attendees are provided at **Annex J**.

Summary Of Annexes

- Annex A Syllabus for Modules 1, 2, 3, and 4
- Annex B Attendance Lists Modules 1, 2, 3, and 4
- Annex C Completed Course Evaluations, Modules 1, 2, 3, and 4
- Annex D IPC Draft Customer Survey
- Annex E Customer Service Action Plan
- Annex F Draft IPC Operating Plan for 1999
- Annex G Memorandum on Investor Servicing/One Stop Shop Issues
- Annex H Draft Scope of Work for Account Executive Training Module
- Annex I Training-Related Press Releases Given to AMIR
- Annex J Course Materials (Print Outs of Power Point Slides)

Annex A Syllabus for Modules 1, 2, 3, and 4

**FOREIGN DIRECT INVESTMENT PROMOTION TRAINING
INVESTMENT PROMOTION CORPORATION (IPC)**

Syllabus for Modules IV, and III

Lead Trainers: Vincent Ruddy, Senior Consultant, The Services Group, Inc.

Dates: February 20 - March 3

Schedule: Morning Session (Group A): Saturday-Wednesday, 10:00 a.m. - 12:00 p.m.
Afternoon Session (Group B): Saturday-Wednesday, 2:30 p.m.- 4:30 p.m.

MODULE IV: Global Investment Trends & Targeting Investors (Week 1)

February 20 (Saturday)

Course Introduction (Modules I - IV)
Why Promote Foreign Investment?
Case Study: Investment Promotion in Latin America/Caribbean Basin (In-Class review & discussion)
Types of Investment
Types of Foreign Direct Investment (FDI)
Types of Promotion Institutions
(Hand-out Harvard Business School Case Study: Marketing Massachusetts)

February 21 (Sunday)

Marketing Massachusetts: Case Study Discussion
Principal Investment Promotion Styles
Principal Investment Promotion Activities
(In-class viewing of training video segment, lessons learned)
Discussion of video segment
(Hand-Out Harvard Business School Case Study: Ford in Spain)

February 22 (Monday)

Global Foreign Direct Investment Trends
Regional FDI Trends

Inward
Outward
Impact of Asian Financial Crisis
Key Factors Influencing Investment Patterns
Ford in Spain: Case Study Discussion

February 23 (Tuesday)

Corporate Location: What motivates a Company to Invest Abroad?
Structure of the Location Decision
Case Study: Mercedes Benz
Homework Assignment: Role of IPC in Location Decision Process

February 24 (Wednesday)

(In-class viewing of training video segment, Dominican Republic CPI)
Discussion of Video Segment
Targeted Marketing Programs
The Investor Targeting Strategy (ITS)
Building on the ITS

MODULE III: The Selling Process (Week 2)

February 27 (Saturday)

The Promotion Pyramid
Identification of Potential Investors
Outreach Techniques
Categorization of Potential Investors
The Investor Tracking System
Tapping into Commercial and Industry Associations
(Handout Homework Assignment: Effective Advertisements)

February 28 (Sunday)

Image Building
(In-class viewing of training video segment: public relations)
Discussion of Video Segment
Internet Strategies
Review of Sample Web-Sites
Advertisements: "Ideal vs. Idealized" Exercise
Direct Mail
(Handout Homework Assignment: Effective Business Communications)

March 1 (Monday)

Effective Business Communications (Review of Homework)
Cold Calls
(Class Exercise: Getting Through to Decision Maker)
Effective Phone Communications
(Handout Homework Assignment: Presentation Preparation)

March 2 (Tuesday)

Outward Missions
Planning an Outward Mission
Execution of Outward Missions
Follow-Up
Participation in International Fairs & Exhibitions
Effective Meetings
Effective Business Presentations

March 3 (Wednesday)

Inward Missions
Planning an Inward Mission
Execution of Inward Missions
Follow-Up
(Class Exercise: Presentation to Targeted Investor)
Summary & Wrap-Up of Modules III & IV

**FOREIGN DIRECT INVESTMENT PROMOTION TRAINING
INVESTMENT PROMOTION CORPORATION (IPC)**

Syllabus for Modules I & II

Lead Trainers: Vincent Ruddy, Senior Consultant, The Services Group, Inc.
John Hagestadt, Senior Investment Promotion Advisor, The Services Group, Inc.

Dates: April 3 - 20, 1999

Schedule: Module I: Afternoon Sessions: Saturday-Wednesday, 2:30 p.m.- 3:30 p.m.
Module II: Morning Sessions: Saturday-Wednesday, 8:30 p.m. - 10:00 p.m.

MODULE I: Managing the Investor I-- Customer Service

April 3 (Saturday)

IPC Management Briefing

Session 1a. What is Great Customer Service?

Opening Comments

What is a Customer?

Who are Our Customers?

What do Our Customers Want/Need?

Customers Expectations

Your Basic Responsibilities

Customer Service Self-Evaluation

What is Investor Facilitation?

April 4 (Sunday)

Session 1b: Why Provide Great Customer Service?

Who Benefits from Great Customer Service?

How Does My Organization Benefit?

(Angry Clerk/Angry Customer Role Play)

How do I Benefit?

How Does the Customer Benefit?

(Handout Homework Assignment)

April 5 (Monday)

Session 2: The Five Steps to Great Customer Service

Discussion of Homework

The Five Steps to Great Customer Service

(Classroom Role-Play: Wants Vs. Needs)

Which of these Ideas Will You Use?

(Handout Homework Assignment)

April 6 (Tuesday)

Session 3: Researching the Customer, Telephone Etiquette and Dealing with Difficult Customers

Review of Homework

Researching the Customer

Telephone Etiquette

Quiz

Phone Skills
(Telephone Etiquette Individual Role-Play)
Dealing with Difficult Customers
(Classroom Role Play- Difficult Customer)
(Individual Role-Play)

April 7 (Wednesday)

Session 4: Team Service
Review of Homework
Classroom Role Play: The Weak Link
What does it mean to be a team?
Is Your Team on Track?
Are You on Track?
What must I do to help
Four Conflict Traps
The Five Basic Truths
Review of Module
Wrap-up and Closing Exercise

April 10 (Saturday)

Case Studies

MODULE II: Managing the Investor II? Winning Customers & Keeping Them

April 11 (Sunday)

Session 1: Effective Selling Part I
Introduction to Effective Selling
Purpose
Goals
Review of Necessary Skills
Communication Skills
Sales Skills

April 12 (Monday)

Effective Selling Part II
Earning the Right to Sell
Understanding Customer Needs/Responding to Customer Objections
Making Recommendation
Completing the Sale
Knowing when to let go

April 13 (Tuesday)

Investor Aftercare Part I
Phases of Investment Facilitation Services
Why Investor Aftercare is Important
Key Players in Investor Aftercare
Institutional Models for Investor Aftercare

April 14 (Wednesday)

Investor Aftercare Part II

10 good investor aftercare habits to develop

10 major don'ts of investor aftercare

How to Survey Your Customers

(Homework: Design of Survey)

April 17 (Saturday)

Investor Aftercare Case Studies

April 18 (Sunday)

Applying Good Practice

(Review survey homework assignment)

Using Results of Survey to Upgrade Promotion & Services

Creating an Action Plan

April 19 (Monday)

Dealing with Other Institutions & Wrap-Up

The "Roadmap" Approach to Improving Investor Aftercare

Roadmap Phases

Investor Facilitation Quality Groups

Review of Module II

Wrap-Up

Debriefings & Certificates

Annex B Attendance Lists Modules 1, 2, 3, and 4

MODULE 1 & 2 ATTENDANCE APRIL 1999

April											NAME	No.
19	18	14	13	12	11	10	7	6	5	4	3	
X	X	X	X	X	X	X	X	X	X	X	X	* Mr. Ahmad Al_Qasier
	X	X	X		X	X	X	X	X	X	X	* Mrs. Dina Daadaa
X		X	X	X		X	X	X		X	X	* Mr. Fawaz Nahar
	X		X	X		X	X	X	X	X		* Mr. Ghaith Sawalha
X										X		Miss Hanan Baroud
									X			Miss Hunaida Sami Kawar
		X	X	X		X	X	X	X	X		* Mr. Ibrahim Bashayreh
X							X					Mr. Ismail Al-Smail
		X	X	X	X	X	X	X	X	X	X	* Mrs. Iman Naimi
									X			Mr. Jameel Al-Asfar
								X	X			Mr. Kamal Dabbass
	X	X	X	X	X	X	X	X	X	X	X	* Mr. Khaldoon Salman
X									X	X		Mr. Khalil Kassab
							X	X	X			* Mrs. Mary Hamarneh customer service module only
	X	X				X		X	X	X		* Mr. Mahmoud Alsaïd
		X	X	X	X			X	X	X	X	* Mr. Mousa Diabat
X										X	X	Mr. Muwaffaq Abu Aqola
										X		Mr. Rafat Tobaishat
		X	X	X	X	X		X	X	X		* Mrs. Razan Tubashat
X		X	X	X	X	X	X	X	X	X	X	* Mrs. Sahar Hijazi
X		X	X	X		X	X	X	X	X	X	* Miss. Sana Abbadi
	X	X	X	X	X	X	X			X	X	* Miss. Sarah Harpending
					X							Mr. Thaer Ghazal
	X	X					X	X	X			* Mrs. Weasl Yeacob

Attendees with an * against their name receive a certificate

MODULE 3 & 4 ATTENDANCE Feb-March 1999

March				Feb				NAME	No.
3	2	1	28	27	24	23	22	21	20
									* Mrs. Dina Daadaa
									* Mr. Fawaz Nahar
									* Mr. Ghaith Sawalha
									*Mr. Ismail Al-Sumadi
									* Mrs. Iman Naimi
									* Mr. Jamil Al-Asfar
									* Mr. Mousa Diabat
									Mr. Muwaffaq Abu Aqola
									* Mrs. Sahar Hijazi
									* Miss. Sana Abbadi
									* Miss. Sarah Harpending
									Ms. Reem
									Intern No. 1 (name unrecorded)
									Intern No. 2 (name unrecorded)

**Attendees with an * against their name receive a certificate,
Meaning they missed no more than 2 sessions of a given module
(attendance sheets unavailable for specific days; above based on certificates & trainer's memory)**

Manager's Sessions, April 1999

April				NAME	No.
18	14	13	7		
	X	X	X	Mr. Muwaffaq Abu Aqola Director, Promotions Dept.	
X	X	X	X	Dr. Montasser Oklah Director General	
X	X	X	X	Mr. Mahmoud Alsaid Director, Administration	

X	X	X	X	Engr. Mari Ibdah Director, Research & Planning
X	X			(Name unrecorded) Director, Investor Services
X	X	X	X	(Name unrecorded) Internal Audit

Annex C Completed Course Evaluations, Modules 1, 2, 3, and 4

Annex D IPC Draft Customer Survey

Investment Promotion Corporation

**Proposal
Of a Study to Measure Customers' Satisfaction**

Imad AbabnehImad Ababneh
Isamil Smadi

Department of Development and PlanningDepartment of Development and Planning
1999

Measuring Customers' Satisfaction

Objectives of the Study:

Measuring the customers' satisfaction with the service delivered thereto at the Investment Promotion Corporation
Providing a database regarding the attributes of those benefiting from the service delivered by the Corporation.

Importance of the Study:

The Investment topic attracts the attention of the successive Jordanian governments and it witnesses a persistent international competition. The several countries including Jordan seek to improve the investment environment there through the legislation and the economic reforms as well as improving the level of services to investors. Offering competent and benefiting services to the investor are very important to improve the image of investment in the Kingdom and to attract more investments. The Investment Promotion Corporation exerts the keen effort to introduce improvements to the method and approach of service delivery to those who report to the Corporation in a manner to satisfy investors and fulfill their aspirations. This study has assured the awareness of the Corporation to deliver better services while troubleshooting problems in service delivery.

Methodology of the Study:

The Study is based on the following methodology:

Designing the questionnaire that aims at measuring the customers' satisfaction with the services offered by the Investment Promotion Corporation.

Forwarding the questionnaire to those reporting the Corporation who wish to receive the services offered by the Corporation and classified in the questionnaire.

Nominating the employees from outside the Planning Department to consult over each stage of the study.

The repetitions and rates as well as analyzing the variance of differences in the opinions of the service beneficiaries.

Sample of the Study:

These are the persons who report to the Investment Promotion Corporation to receive the specific services beforehand in the research form derived from the nature of jobs implemented by the Corporation during the study period. The chronological element has been viewed as constant. The form will be filled in during the period of 18.3.1999 up to 6.4.1999. Those reporting to the Corporation during this period are expected to reach 45 reporters/day.

A Proposal of a Questionnaire
Measuring the Customers' Satisfaction
No. of Questionnaire ()

Date (of filling the questionnaire)

First: Personal Information

Name:???????????? Postal Address:????????? Name:???????????? Postal
 Address:?????????
 Telephone: ??????????.. Fax :?????????..
 Nationality:?????????????
 Capacity of the Customer:

- ☐ Investor/Investment Decision Maker **Investor/Investment Decision Maker**
- ☐ Authorized by the Investor Authorized by the Investor
- ☐ Employee for the Investor/Company
- ☐ Public Sector Employee
- ☐ Following up the services of the Corporation

Sex: ☐ Male ☐ Female

Education Background:???????????? Education Background:???????????

Second: Information about the Investment Activity:

Type of Investment:

- ☐ Already in Existence
- ☐ New
- ☐ Benefiting from the Law

Name of Company:?????????????. Its Legal Capacity:?????????..

Production Sector:?????????.. Estimated Amount of Investment:?????????.

Nationality of Investment: Local (%) ☐ Foreign ()%

Third: Establishing the relation with the Corporation:

I came to know the Corporation from a :

- ☐ A beneficiary Investor
- ☐ Mass Media
- ☐ Exhibition
- ☐ Conference
- ☐ Internal Contact by the Corporation

☐ Meeting ☐ Others, Specify??????..
I have visited the Corporation several times before ☐ Yes ☐ No

I maintain personal relations (outside the work scope) with employees of the Corporation:
☐ Yes ☐ No

My evaluation of the services delivered by the Corporation with regard to competence and efficiency: ☐ High ☐ Medium ☐ Low

My knowledge of the services delivered by the Corporation is:

☐ Sufficient ☐ somehow sufficient ☐ not sufficient

The Service I request:

Submitting an application of Investment to obtain the exemptions
Submitting an application of Investment to obtain the exemptions
Searching for an investment opportunity
Facilitating the procedures to get the permits and licenses
Others, specify
Information about the investment environment
Information about a sector
Obtaining a nationality
Claims (financial) or price quotations
Claims (financial) or price quotations

The Department you visited to obtain the service:?????????????.

Fifth: Degree of the Customer Satisfaction:

Expressions

Degree of Satisfaction
Degree of Satisfaction
High Fair Low
Low

- * The Corporation's Location is adequate to get the service
- * Clarity and availability of the guidelines to receive the service
- * Receiving and guiding you to the concerned section/employee
- * Level of necessary services (W.C. waiting room, cafeteria?)
- * Level of tools and equipment used to deliver the service
- * Procedures followed up to deliver the service
- * Time spent to get the service
- * The concerned employee has been understanding and knowledgeable of your requirements
- * Human and social treatment of the employees (away from service delivery)
- * How far could you get the required service
- * Level of the service you got

I will be visiting the Corporation in future to benefit from its services

Yes

No

No

I will advise the investors to visit the Corporation of Investment Encouragement to obtain its

services

Yes

No

No

I would propose the following to improve services:

.....

.....

.....

.....

Thanks for your cooperation

Time Table to Conduct the Study

ACTIVITY	Feb.		March				April			
	4 th Wk	1 st Wk.	2 nd Wk.	3 rd Wk	4 th Wk	1 st Wk.	2 nd Wk.	3 rd Wk	4 th Wk	4 th V
Producing the Proposal & Form										
Amendments to the Feedback										
Procedures										
Pilot phase of the Questionnaire										
Distribution of questionnaire										
and gathering the results										
Auditing										
Programming										
Data Entry										
Analyzing the questionnaire										
results										
Receiving answers and										
introducing amendments										
Preparation, and final typing										

Note: a copy of the questionnaire will be produced in English

Annex E Customer Service Action Plan

Annex F Draft IPC Operating Plan for 1999

**The Hashemite Kingdom of JordanThe Hashemite Kingdom of Jordan
Investment Promotion Corporation**

An Internal MemoAn Internal Memo

**To : H.E. the Director GeneralTo : H.E. the Director General
Fm: Director of Planning and DevelopmentFm: Director of Planning and
Development**

Date: 13.4.1999Date: 13.4.1999

Subject: the Corporation's Plan for 1999Subject: the Corporation's Plan for 1999

Dear Sir,

Please find enclosed for your review the Plan of the Corporation during the current year 1999. I wish that your Excellency would review it and give instructions in order to have the plan discussed in the presence of the concerned colleagues according to your instructions on the meeting of the Committee of the Plan and Policies held on 12.4.1999.

Sincerely,

Cc : the Department of Facilities and Investors' Services
: Director of Promotion Department
: Organizational Services Department
: Head of the Internal Control Unit

Plan of the Year 1999Plan of the Year 1999

First: Department of Facilities and Investors? Services:

No	Objectives	Tasks
1.	Working on transferring the approved investments according to the Law into actual investments.	Meeting at the investors? gatherings on a periodic within a timetable plan set for this purpose to couns and introducing them to the investment environment i lom.
2.	Maximizing the rates of increase in the investments of investors already in existence.	Providing the Investors with necessary information
3.	Providing the facilities and motivations as stipulated in the Law for the projects submitted in the application to benefit easily and in the shortest time possible.	Producing and implementing a program of follow u the beneficiary projects.
4.	Serving the investors to get all the necessary approvals.	offering facilities and motivations stipulated in th Offering the services necessary for the investor to g sary licenses and approvals to license the project. ; investor and offering the necessary advice during th ases of the project. with the investor even after the actual running of th ing the ingestors to increase and expand their existin its. -site service.

Plan of the Year 1999Plan of the Year 1999

Second: The Department of Planning and Development and Information Services

No.	Objectives	Tasks
1.	Producing the annual plan of the Corporation and its objectives and monitoring its performance.	Revising the Corporation?s strategy the Corporation?s monitoring. report of the Corporation.
2.	Producing the several reports.	ing programs? implementation.
3.	Setting training programs for the Corporation?s personnel.	unks. aining and improving the system adopted by the it Promotion Corporation.
4.	Providing data on the investment atmosphere in the Kingdom, the investment requirements and the sectors of priority.	puterizing the several administrative and technical (Salaries, personnel affairs, nationalization). udies/mining sector.
5.	Following up the legal affairs of the Corporation	ive studies of the laws ruling the investment activitie gdom. with the several ministries of the Country. jobs of the Committee of the Arab investors.

Plan of the Year 1999Plan of the Year 1999

Third : The Department of Investment Generation (Promotion)

No	Objectives	Tasks
1.	Targeting new large investments.	Organizing field visits to investors in the Kingdom. Achieve partnerships among investors (locally-locally) lly- internationally).
2.	Developing a positive image of the Kingdom among the concerned investors locally and internationally.	and plans leading to the acquisition of support y to improve the investment image in the Kingdom. stment data system to locate prospective investors in
3.	Achieving foreign investments directly especially in the sectors of relative and competitive advantages in the Kingdom.	ted sectors. nternational reports and defining the directives and it of investors on the international level. ractical plan to target prospective investors for this working on reaching the aspired outcomes. of local parties supporting the Corporation such as: ambers of commerce and industry, all businessmen, rters Association, export development, Amman Stock Agricultural Credit Corporation? etc) within a plan set urpose.

8.

Organizing sectoral meetings within the several
nent sectors in order to establish confidence and
mication with the Corporation as well as defining the
of these sectors and the problems they face in order to
ate in the adequate solutions.
ole of our embassies abroad.
ole of the Corporation on the information level through:

is media.
nmunication means.
d printed matter.
s.

promoting a bureau at the airport for the services of
rs.
several investment directories especially that of the
nent opportunities and the directory of investor service
ements).
romotional information disseminated on the Web site of
poration.
rams and promotional films about the Kingdom.
of action with details to benefit from the grant offered
AIR).

Plan of the Year 1999Plan of the Year 1999

Fourth: Department of Organizational Services:

No.	Objectives	Tasks
1.	Supporting the activities of the Corporation through the implementation of personnel affairs? policies, collecting the revenues of the Budget, efficient expenditure, administrative procedures and effective Secretariat.	Setting the financial and administrative regulations and s to assure institutional and clear implementation of nd supervising the application of these regulations and s.
		employment policies depending on proficiency in order the vacancies at the Corporation according to a clear ble.
2.	Organizing the financial and administrative matters of the Corporation.	financial and administrative reports on a regular ical) basis. ning books and records as well as executing all the ures set therein. evenues of the budget. f programs for the year (2000)

Plan of the Year 1999

Fifth: Department of Internal Control:

No.	Objectives	Tasks
1.	Assuring accuracy and correctness of the administrative and financial procedures.	Assuring the expenditure transactions. • implementation of the Budget.
2.	Ensure the commitment to the valid regulations and by-laws.	• accuracy of accounting registers performance, documents and supporting instruments according to the duly mentioned accounting practices.
3.	Providing the information to the Corporation with regard to the valid administrative and financial by-laws and regulations by means of feedback.	verifying the accurate use and progress of work done by committees of bids and procurement and the other several committees. • implementation of all the administrative regulations specially in relation with the auditing of leaves, days-off, normal working hours cards, records and orders of transportation and the use of fax and telephone services. and promoting the role done by the several inventory committees.
2.		

Annex G Memorandum on Investor Servicing/One Stop Shop Issues

MEMORANDUM

TSG

THE SERVICES GROUP, INC.

2300 Clarendon Boulevard, Suite 1110

Arlington, Virginia 22201 USA

Telephone: 703/528-7444

Facsimile: 703/522-2329

Internet: vruddy@tsginc.com

To: Dr. Montaser Oklah
From: Vincent Ruddy, The Services Group, Inc. (TSG)
Date: 05/12/99
Project Code: AMIR/Training
Total Pages:
C.C.: Steve Wade; Sam Morris; Hugh Doyle

Re: "One Stop Shop" Recommendations

As requested, we have reviewed the issue of providing one-stop investment services in the context of Jordan. The following provides a summary of international experience with such mechanisms, along with our recommendations for devising an appropriate one-stop investor service program in the specific context of Jordan.

After the past discussions held with IPC management to talk about the pro's and con's of the different variants of "one-stop shops", we were encouraged to hear that a new proposal has been developed, taking into consideration international experience as we have been discussing. This latest proposal (see description below) would seem to incorporate most of our recommendations, and reflect a prudent and effective approach. We encourage the IPC to follow through with this proposal, and we will be happy to provide any possible additional information or support needed to do so.

Institutional Models for Investor Facilitation

Governments around the world have used a number of different institutional structures to help investors get their projects started once a decision has been made to go forward with an investment. The most common of these are summarized as follows:

The Uncoordinated Model: This model consists of many different agencies related to investment and business start-up, each acting individually in a dispersed and uncoordinated fashion. Investors are forced to approach each one on their own, in many cases leading to repetition, confusion, and delays, and often resulting in investors turning away from the given country and looking elsewhere for opportunities. This model was common in the past, but is now rarely seen due to the international consensus that has developed in favor of promoting and facilitating investment through more pro-active and user-friendly approaches.

The Elusive "True One-Stop Shop": Theoretically, this model consists of a central agency or institution, fully vested with the necessary authority to issue all significant approvals, permits, and licenses to investors. In practice, most governments have found it impossible to implement this model due to a variety of problems. The most substantial obstacle comes from the inevitable resistance to it by most existing authorities-- they are unwilling to let go of their current authority or

delegate it to another entity. Other problems stem from the specialized nature of various regulatory functions. A single agency may often find it difficult to develop capacity to effectively handle all investment-related procedures within one "shop". One-stop shops have worked, however, for certain types of procedures for which the original collection of relevant departments or officials resided within a given government agency. For example, one-stop service windows have worked well for export documentation requirements handled within single Ministries of Trade. Unfortunately, investment-related procedures invariably involve a fairly wide range of different government ministries and authorities, one of the reasons why few countries have succeeded.

The "Bureaucrat Showcase" One-Stop Shop Model: This model is usually embraced by policy makers who remain captivated by the allure of the one-stop-shop ideal, and try to force it into existence in spite of the difficulties mentioned above. Such officials often find that the easiest way to remedy the "turf battle" problem and obtain support for the one-stop-shop concept from other government bodies is to allow each one of them to retain most if not all of their existing powers and authorities. Representatives from each authority are designated, and typically asked to re-locate from their home office to the new "one-stop-shop" office. A showcase of bureaucrats is thus created.

The "bureaucrat showcase" model has proven to be a complete failure in the vast majority of countries where it has been adopted, including Tunisia, Egypt, certain Philippine agencies, and several countries of Africa. The inherent weaknesses are many: The volume of work for many investment procedures is low and fluctuates widely, which leads to representatives sitting around doing nothing for great portions of time. This leads to the selection of relatively lower-level staff to serve as one-stop shop representatives, meaning that they rarely have the authority themselves to issue approvals, and therefore remit all applications back to the home office. Instead of saving time, the representative often increases processing periods, since they become an additional step in the process (for this reason, these types of one-stop shops are frequently referred to as "one-more-stops"). Other problems include the lack of direct supervision of the assigned representatives, their gradual loss of power and influence back at their home offices, the creation of an unproductive working environment which creates a negative image for investors and often leads to low morale and a bad work ethic (representatives come late or not at all, and when they do come they are frequently found reading newspapers, drinking coffee, etc.).

The Account Executive One-Stop Investor Facilitation Model: This model is based on the approach utilized by many successful after-sales programs and service organizations in both the private and public sector. It basically consists of designating single investment facilitators, or "account executives", to a given investor once he or she has decided to invest. The sales representative responsible for the investor up to that point facilitates a hand-off to the Account Executive, who then takes over and works closely with the investor to follow through on procedural and other issues relevant to start-up. This includes activities such as making visits to the various relevant agencies (either by themselves or accompanying the investor); collecting relevant forms and helping the investor to fill them out correctly; explaining procedural issues to investors and making sure things go smoothly; etc. Each account executive works full time, and may handle a number of investors at any one time, say 5 to 7, although it may be possible and/or preferable to assign more or less. This model has proven to be quite successful in several countries, including many that have earned reputations for investment promotion success (e.g., several state/regional economic development agencies in the United States and Great Britain; Costa Rica; Singapore; and the Dominican Republic)

The "account executive" model has the obvious advantage of providing a one-stop center for information and investor support, without generating the high degrees of inter-institutional jealousy or

organizational problems described earlier in regard to other models. However, it normally does work better when certain conditions are created, due to the fact that approvals still take place in a number of different agencies, any of which may or may not feel compelled to cooperate. These conditions which are conducive to success include:

High-level political support. Ideally this should come from high level officials with substantial influence over the range of relevant cabinet ministries-- in other words, the Prime Minister, the President, or in the case of Jordan, His Majesty the King. The support should be communicated formally through official proclamations, decrees, government plans and policy directives, in addition to being disseminated through popular media whenever possible.

Efforts to improve procedures within each relevant agency. These may include "re-engineering" exercises such as the Investor Roadmap effort currently being conducted in Jordan. In some cases, customer service training can be provided to agencies, benefitting them not only by improving the investor interface, but also by improving the overall efficiency and effectiveness of the organization, including areas other than investment procedures.

Dispute resolution mechanism. Whenever possible, approvals and procedural problems should be worked out at the working level, with the Account Executive acting as a facilitator between investors and relevant public officials. However, if the problem cannot be resolved at this level, there should be some easy and relatively quick way to bring the problem to the attention of a higher-level body, one that has the power and authority to intervene and, if appropriate, facilitate a fast and favorable solution.

Recommendations for Creating a One-Stop Investor Facilitation Center in Jordan

Based on the above summarized international experience, and on the specific conditions found in Jordan, the following approach is recommended:

Key Elements for a Successful One-Stop Investor Facilitation Center in Jordan:

Show High-Level Political Support. It is recommended that the Prime Minister, and ideally His Majesty the King, voice clear public support for investor facilitation, and more specifically, for the cooperative arrangements implied by the One-Stop Investor Facilitation Center and all associated agencies and staff.

Use The Account Executive One-Stop Investor Facilitation Model. Initially, between 4 and 6 account executives will be nominated; more may be added at later stages if the volume of new business start-ups increases substantially.

Provide Intensive Training for Each Account Executive. This training should begin as early as possible (July is currently proposed for training start-up, to be confirmed by AMIR/USAID). It should be hands-on, practical, and focused in both classroom sessions and on-the-job at the work desks of designated account executives. Account executives should be involved as appropriate in procedural re-engineering efforts (i.e., Roadmap), so that they become more familiar with the overall steps for investment.

Designate Appropriate Liaison Staff at Each Relevant Agency. This should be done by the associated ministry or department, with an emphasis on putting forward sufficiently qualified staff with good public relations skills.

Provide Training to Other Agencies. Customer Service training should be offered to other agencies on a voluntary basis, particularly to departments and staff involved with relevant procedures and interfacing with investors.

Form a High-Level Committee/Dispute Resolution Body. This should be headed by an

official with sufficient influence and power to command the respect and cooperation of all relevant agencies and their departments. High-level representatives from all key agencies would be assigned to this committee and asked to participate in meetings called periodically and at short notice as required.

Use On-Going Performance Measurements. As part of their routine activities, account executives will track how long various procedures take to be completed for the investors they are assigned to support. Performance data would be collected and analyzed to determine apparent bottlenecks, give the high-level committee information on both problems and progress, and to provide incentives for agencies to improve their own internal procedures.

Undertake a Publicity Campaign to Increase Awareness of the Importance of Investors.

Through bulletins, circulars, advertisements, staff meetings, and other venues, the message must be communicated that investors are important, and that they deserve high quality services and support from all related government agencies. The words of high level government officials (see 1. above) should be printed and repeated as often as necessary to demonstrate the urgency of this issue.

Approaches to Avoid

Problems and failures in other countries attempting to establish "one-stop shops" lead us to conclude that the following approaches should be avoided as much as possible:

Do not permanently re-locate designated liaison staff to a central "one-stop shop" office.

As described above, this tends to cause more problems than it solves.

Avoid a bureaucracy-focused approach. Such an ill-advised approach would include models that assign individual IPC members to become "experts" on one or more agencies/procedures (this becomes problematic when one of these "experts" leaves or is absent; it also forces the investor to have to deal several counterparts instead of just one).

Do not wait until investors need approvals/permits before account executives and designated liaison representatives get together and meet. It is preferable that meetings, information exchanges, and early relationship-building take place beforehand, in a less tense environment filled with a cooperative spirit instead of the stress typically generated when real investors solicit approvals. Account executives should attempt to find out the needs and concerns of each agency, and seek ways to make work easier for their counterparts as well as themselves.

The Latest Proposal of the IPC

According to Mr. Marei, the IPC committee charged with developing a proposal for a one-stop investor servicing center has modified its proposal. It now consists of the following 12 elements:

Space will be designated at the IPC for a One-Stop Investor Services Center. This will be the main location for account executives and any other relevant staff.

Between 5 to 10 staff will be assigned from the IPC to serve as Account Executives

All investment related agencies will be asked to designate liaison officers to be contacts for

IPC account executives in their work on behalf of investors.

These designated liaison officers will not re-locate permanently to the IPC, but rather, will remain based at their home agencies.

Training will be provided to account executives and to liaison officers and other staff from relevant agencies.

Meetings will be held for liaison representatives and IPC staff to discuss issues relevant to investor start-up and other relevant issues.

A high-level committee ("steering committee") will be created, comprised of representatives of key agencies. This will follow up on any problems detected and undertake monitoring of performance of various agencies.

Someone will be assigned to deal with complaints of investors or others who have not yet been assigned account executives for whatever reason.

A regulation or by-law will be issued in order to give legitimacy to the overall framework proposed for this model.

Account executives will be encouraged to learn as much as possible about the procedures and requirements of all relevant agencies, rather than having them specialize in one or just a few.

An effort will be made to consolidate information requirements, and to allow initial forms filled out by investors to serve as source applications for certain types of licences and permits for which the same information is required.

A broad range of relevant agencies should participate in this effort. At present, the following are named: Ministries of Industry and Trade, Tourism, and Health; Municipalities; Water and Irrigation; Transport; Agriculture; Energy; Interior Affairs; Labor; Central Bank; Regional Authorities; Greater Municipality of Amman; General Corp. for Environmental Protection; the Land Department; Public Utilities providers; Civil Defense.

Summary and Conclusion

The latest IPC proposal for a one-stop investor facilitation center incorporates most if not all of the recommendations TSG has made based on international best practice.

John Hagestadt and I agree that it would be advisable to offer a proposal, based on the 12 basic elements described above, to the appropriate government officials. It should be referred to ideally as a "one-stop investor facilitation center" or as the "one-stop investor services center", rather than a "one-stop shop", a less appropriate term in our opinion. It will of course be important to follow-up on all aspects of the plan, assigning specific individuals to be responsible for developing the project and undertaking necessary preparations. We are at your disposal for any other advice or support we can offer in this regard.

Annex H Customer Service Action Plan

PRESS RELEASE

February 28, 1999

Leading Experts Provide Training to Jordan's Investment Promotion Corporation (IPC)

(Amman, Jordan) In preparation for an aggressive promotion campaign aimed at attracting greater levels of investment to Jordan, managers and staff of the Investment Promotion Corporation (IPC) have begun an intensive training program led by top investment promotion experts.

The experts, part of a special program supported by the United States Agency for International Development (USAID), are teaching IPC staff the skills and techniques they need for successful investment promotion. The training program is based on lessons learned from some of the world's most successful promotion agencies, including those in the United States, Singapore, Malaysia, Ireland, Costa Rica, South Africa, and the Dominican Republic.

The training involves both theoretical knowledge transfer as well as practical, hands-on training exercises, including case studies and interactions with recent and potential investors. During February and March, IPC staff and management will participate in four different training modules, each related to key aspects of investment promotion.

According to Vincent Ruddy, one of the experts currently leading the training seminars, the IPC personnel participating in the training program have already begun to apply what they are learning in their daily promotion activities. "The IPC staff are young, energetic, and eager to learn how they can more effectively encourage investment in Jordan," says Mr. Ruddy. "By applying the lessons learned from successful investment promotion agencies in other countries, and by avoiding the mistakes made by some of the less successful ones, IPC has a chance to become the leading organization of its kind in the region".

The training program is part of the AMIR program, a USAID-supported initiative aimed at supporting Jordan's economic development in two key areas:

Transforming Jordan's business environment to stimulate greater investment to meet the challenges of economic globalization; and

Increasing economic growth with equity through sustainable microfinance initiatives

For more information about the IPC, or the training and other activities provided by the AMIR program, please contact:

(Name, title, telephone, e-mail, etc. of AMIR contact person)

PRESS RELEASE

April 19, 1999

Customer Service Training Boosts Jordan's Efforts to Attract Foreign Investment

(Amman, Jordan) Staff and Management of Jordan's Investment Promotion Corporation (IPC) have recently completed an intensive customer service and investor aftercare training program. The training is designed to provide the IPC with state-of-the-art capabilities for dealing with investors, optimizing skills and associated systems for communicating with them, facilitating site visits, and other key activities tied to the investment process.

Two international investment promotion experts led the training workshops, which were held at the IPC's facilities in Amman. Mr. John Hagestadt, one of the experts who formerly worked for the Invest in Britain Bureau in the U.K., indicated that customer service training is a critical element allowing countries like Jordan to attract greater levels of investment. "The IPC management and staff have already shown remarkable progress, and I expect that as a result, more and more investors will obtain a more favorable impression of the investment environment here."

As part of their follow up activities, the IPC will be implementing a customer service action plan. This plan includes additional training, customer satisfaction surveys, and other activities. In addition, other government ministries and agencies that deal with investors are being encouraged to undertake customer service training themselves.

The training program is part of the AMIR program, a USAID-supported initiative aimed at supporting Jordan's economic development in two key areas:

Transforming Jordan's business environment to stimulate greater investment to meet the challenges of economic globalization; and

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Annex I Draft Scope of Work for Account Executive Training Module

Annex J Course Materials